




How to build a multi-million dollar practice with one powerful Idea

Presented by
Wayne Townsend



The Powerful Idea - Relationships



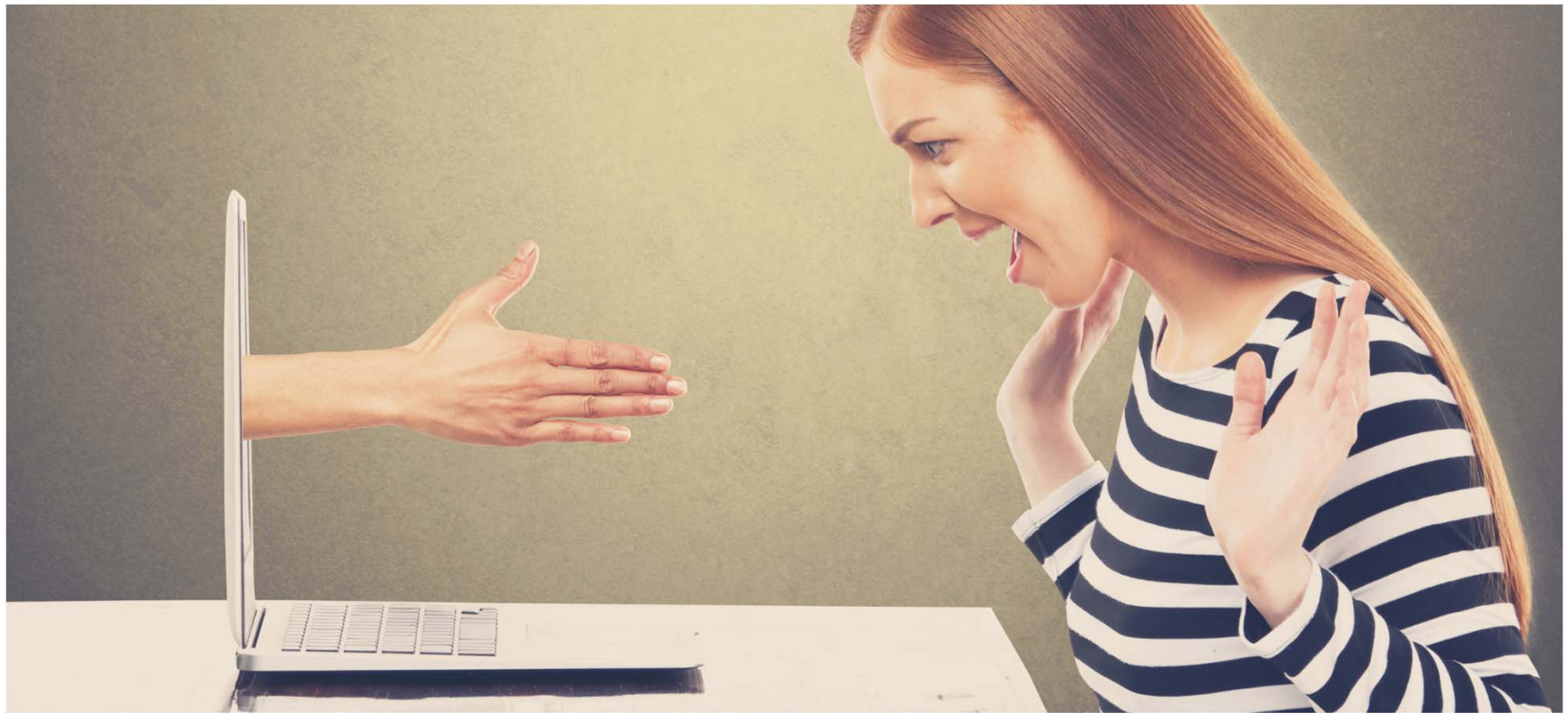
Automated Marketing Without the Relationship



Relationships Without the Technology



1:1 Relationships at Scale





Elevate: The Power to Grow 1:1 Relationships at Scale





5 Keys to Growing Your Business Through Relationships

1. Establish Your Brand
2. Communicate Consistently
3. Provide Real Value
4. Grow Your Circle of Influence
5. Automate the Process



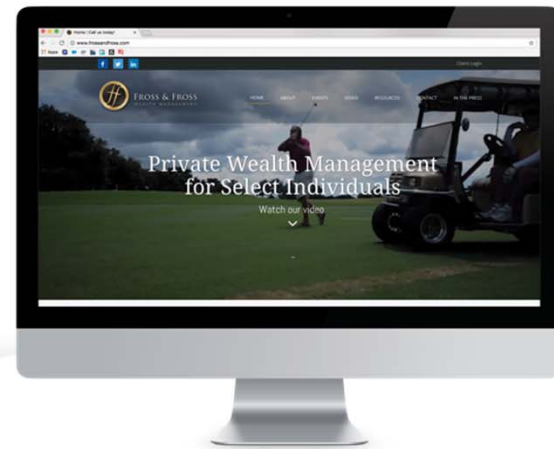
1 | ESTABLISH YOUR BRAND

Establishing Your Brand

1. Define
2. Design
3. Execute



More Than Your Logo



More Than Your Collateral



Slide 11

2 Change this slide to reflect example of brand building.

Tyler McConvill, 10/10/2018

1 Use Hutchinson

Tyler McConvill, 10/10/2018



2 | COMMUNICATE CONSISTENTLY



Your Clients Want to Hear From You


	DAILY	WEEKLY	MONTHLY	QUARTERLY	ONCE OR TWICE A YEAR
Email	3.7%	30.4%	36.6%	19.9%	9.4%
Mail	0%	1.2%	46.6%	29.2%	23.0%
Phone	1.9%	11.9%	36.7%	31.9%	17.6%
Face-to-face	0.5%	2.1%	11.4%	31.1%	54.9%

Over 80 Customizable Communications Every Year





3 | PROVIDE AN EXPERIENCE



“Eight out of ten affluent investors are dissatisfied enough with the services they currently receive that they would change advisors — if they encountered a better alternative.”

Source: Investment News

Surprise and Delight



YOUR LOGO
WEALTH MANAGEMENT

DELIBERATE ACTS OF APPRECIATION

Deliberate Acts of Appreciation occasions to be on the lookout for: (THINK UNIQUE AND UNEXPECTED)

- New home
- Further education
- Death of pet
- Remodeling complete
- New dream car
- Community award
- Etc.

Information should be collected from Clients during **appointments, phone calls and client events** and recorded in RedTail as noted in the "Documenting client preferences, interests and points of contact" procedure.

Gift Ideas include:

- Flowers
- Gift basket with specialty coffees & cookies
- Divot repair tool
- Wine & cheese gift basket
- Gift certificate to favorite restaurant
- Magazine subscription
- Book from favorite author
- Fresh ground coffee
- Hand-written notes /cards
- Picture and frame from event client attended
- Recipe cards
- Music CD

The front desk has different web sites saved that can be used for some of the above ideas.

If you decide to perform a deliberate act of appreciation, please be sure to complete the following steps:

1. Check RedTail notes to ensure there has not been another deliberate act of appreciation performed in the past three months for that client. If there has been and you still feel you should proceed, first check with the Advisor.

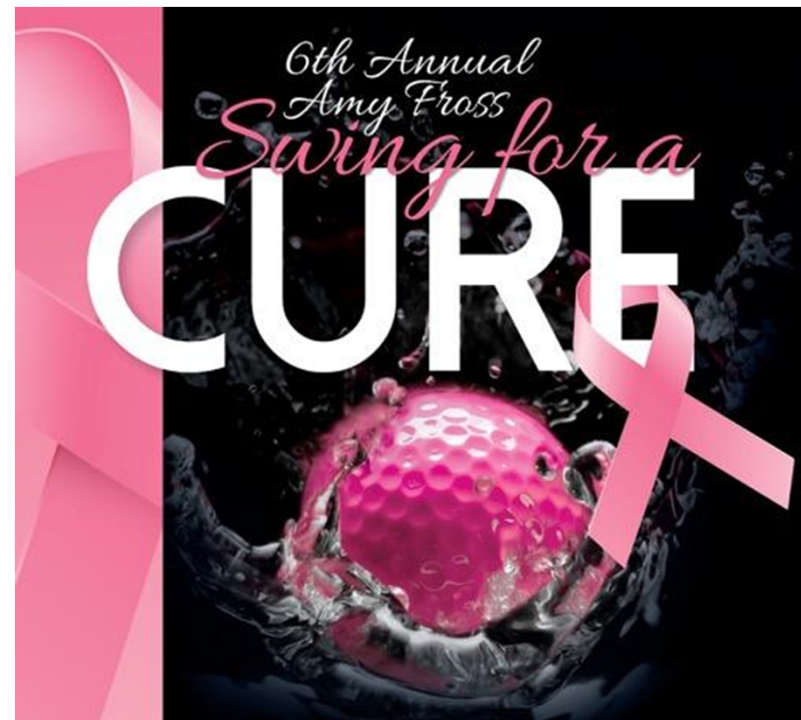
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Rev. 9/26/07



Schwab, Wachsmuth & Partners

Host Client Events, Workshops, and Charity Events





4 | GROW YOUR CIRCLE OF INFLUENCE

Social Marketing Tools





5 | AUTOMATE THE PROCESS

Organize With Automation



Triggered Campaigns



GROWTH STRATEGY





Thank You

Visit

WWW.PLATINUMSTRATEGIES.COM

